



*JFW*

<b>TRANSMITTAL</b>	Docket No.: XTAX-P001US2	Total Pages: 8 + refs.
	Application No.: 10/609,033	
	Filing Date: 06/27/2003	
	First Named Inventor: Mark Albrecht	
	Art Unit: 3621	
	Examiner Name:	

<b>ITEMS INCLUDED:</b>	<b>ADDRESS TO:</b> <input checked="" type="checkbox"/> Mail Stop Amendment Commissioner for Patents P. O. Box 1450 Alexandria, VA 22313-1450																														
<p>1. <input type="checkbox"/> Response to <input type="checkbox"/> After Final.</p> <p>2. <input type="checkbox"/> Extension of Time Request. Applicant(s) hereby requests under the provisions of 37 CFR 1.136(a) to extend the period for filing a reply in the above-identified application. The requested extension is _____; accordingly the appropriate non-small-entity fee is (\$ .00). <input type="checkbox"/> Applicant(s) claim(s) small entity status. See 37 CFR 1.27. Therefore, this fee amount for the extension is reduced by one-half, i.e., (\$ .00).</p> <p>3. <input type="checkbox"/> Substitute Specification.</p> <p>4. <input checked="" type="checkbox"/> Information Disclosure Statement (IDS)/PTO-1449. <input checked="" type="checkbox"/> Copies of IDS citations.</p> <p>5. <input type="checkbox"/> Drawing(s) (35 USC 113) (Total Sheets: _____) <input type="checkbox"/> Informal, for approval of changes <input type="checkbox"/> Formal</p> <p>6. <input type="checkbox"/> Excess claim fees:</p> <table border="0"><tr><td><u>Total Claims</u></td><td><u>Extra Claims</u></td><td><u>Fee (\$)</u></td><td><u>Fee Paid (\$)</u></td><td><u>Multiple Dependent Claims</u></td></tr><tr><td>_____ -20 or HP= _____</td><td>x _____</td><td>25</td><td>_____</td><td><u>Fee (\$)</u> <u>Fee Paid (\$)</u></td></tr><tr><td colspan="4">HP = highest number of total claims paid for, if greater than 20</td><td>180 _____</td></tr><tr><td><u>Indep. Claims</u></td><td><u>Extra Claims</u></td><td><u>Fee (\$)</u></td><td><u>Fee Paid (\$)</u></td><td></td></tr><tr><td>_____ -3 or HP= _____</td><td>x _____</td><td>100</td><td>_____</td><td></td></tr><tr><td colspan="5">HP = highest number of independent claims paid for, if greater than 3.</td></tr></table>		<u>Total Claims</u>	<u>Extra Claims</u>	<u>Fee (\$)</u>	<u>Fee Paid (\$)</u>	<u>Multiple Dependent Claims</u>	_____ -20 or HP= _____	x _____	25	_____	<u>Fee (\$)</u> <u>Fee Paid (\$)</u>	HP = highest number of total claims paid for, if greater than 20				180 _____	<u>Indep. Claims</u>	<u>Extra Claims</u>	<u>Fee (\$)</u>	<u>Fee Paid (\$)</u>		_____ -3 or HP= _____	x _____	100	_____		HP = highest number of independent claims paid for, if greater than 3.				
<u>Total Claims</u>	<u>Extra Claims</u>	<u>Fee (\$)</u>	<u>Fee Paid (\$)</u>	<u>Multiple Dependent Claims</u>																											
_____ -20 or HP= _____	x _____	25	_____	<u>Fee (\$)</u> <u>Fee Paid (\$)</u>																											
HP = highest number of total claims paid for, if greater than 20				180 _____																											
<u>Indep. Claims</u>	<u>Extra Claims</u>	<u>Fee (\$)</u>	<u>Fee Paid (\$)</u>																												
_____ -3 or HP= _____	x _____	100	_____																												
HP = highest number of independent claims paid for, if greater than 3.																															
<p>7. <input type="checkbox"/> Other Fees:</p> <p>8. <input type="checkbox"/> A check in the amount of the above-noted fees is enclosed.</p> <p>9. <input type="checkbox"/> Payment by credit card. Form PTO-2038 is attached.</p> <p>10. <input type="checkbox"/> The Director is hereby authorized to charge any fees which may be required, or credit any overpayment, to Deposit Account Number ( _____ ). A duplicate copy of this sheet is enclosed for this purpose.</p> <p>11. <input type="checkbox"/> Other Enclosure(s):</p> <p>12. <input checked="" type="checkbox"/> Remarks: The Information Disclosure Statement herewith is being filed after three months of the filing date of this national application but before the mailing date of the first Office Action on the merits. Accordingly, it is believed that no fees are due in connection with the filing of this Information Disclosure Statement.</p>																															

TRANSMITTAL  
(Executed Attachment to Page 1)



Page 2

CERTIFICATE OF TRANSMISSION/MAILING	
I hereby certify that this correspondence is being facsimile transmitted to the USPTO or deposited with the United States Postal Service with sufficient postage as first class mail in an envelope addressed to: Commissioner for Patents, P.O. Box 1450, Alexandria, VA 22313-1450 on the date shown below:	
Signature	<i>Lyn Bruhl</i>
Typed or printed name Lyn Bruhl	Date 1/10/06

Dated: 1/10/06

Respectfully submitted,

By:

*[Signature]*  
Anthony L. Miele, Attorney for Applicant(s)  
Registration Number 34,393  
Customer Number 000050048  
Miele Law Group  
2 Summer Street, Suite 306, Natick, MA 01760  
Phone: 508-315-3677 Fax: 508-319-3001



PTO/SB/08b (08-03)

Approved for use through 06/30/2006. OMB 0651-0031

U.S. Patent and Trademark Office; U.S. DEPARTMENT OF COMMERCE

Under the Paperwork Reduction Act of 1995, no persons are required to respond to a collection of information unless it contains a valid OMB control number.

<b>Substitute for Form 1449</b>  <b>Information Disclosure Statement By Applicant</b>		Application Number		10/609,033		
		Filing Date		06/27/2003		
		First Named Inventor		Mark Albrecht		
		Art Unit		3621		
		Examiner Name				
Sheet 1 of 6		Attorney Docket No.		XTAX-P001US2		
<b>U.S. PATENT DOCUMENTS</b>						
Examiner Initials*	Cite No. <sup>1</sup>	Document Number	Publication Date MM-DD-YYYY	Name of Patentee or Applicant of Cited Document	Pages, Columns, Lines, Where Relevant Passages or Relevant Figures Appear	
		US- 6,567,789	05/20/2003	Baker		
		US- 2003/0036912	02/20/2003	Sabotta et al.		
		US- 6,473,741	10/29/2002	Baker		
		US- 6,397,195	05/28/2002	Pinard et al.		
		US- 6,377,982	04/23/2002	Rai et al.		
		US- 2001/0054023	12/20/2001	Murata		
		US- 2001/0037268	11/01/2001	Miller		
		US- 6,246,999	06/12/2001	Riley et al.		
		US- 6,202,052	03/13/2001	Miller		
		US- 6,183,140	02/06/2001	Singer et al.		
		US- 2003/0191674	10/09/2003	Hale et al.		
		US- 2003/0195780	10/16/2003	Arora et al.		
		US- 2003/0144930	07/31/2003	Kulkarni et al.		
		US- 2003/0105687	07/05/2003	Bross et al.		
		US- 2002/0107764	08/08/2002	McCoy		
		US- 6,092,048	07/18/2000	Nakaoka		
		US- 2002/0111888	08/15/2002	Stanley et al.		
		US- 2002/0091602	07/11/2002	Stern et al.		
		US- 2002/0013747	01/31/2002	Valentine et al.		
		US- 2002/0046036	04/18/2002	Kobayashi		
<b>FOREIGN PATENT DOCUMENTS</b>						
Examiner Initials*	Cite No. <sup>1</sup>	Foreign Patent Document Country Code <sup>3</sup> Number <sup>4</sup> Kind Code <sup>5</sup> (if known)	Publication Date MM-DD-YYYY	Name of Patentee or Applicant of Cited Document	Pages, Columns, Lines, Where Relevant Passages or Relevant Figures Appear	T <sup>6</sup>
		JP 2002/2149979	05/24/2002	Hitoshi et al.		
		DE 10156532	07/18/2002	Herbert et al.		
		JP 2002/132980	05/10/2002	Tooru et al.		
		JP 10326314	12/08/1998	Takashi et al.		
		WO 01/35678 A2	05/17/2001	Gryglewicz et al.		

Examiner Signature		Date considered	
--------------------	--	-----------------	--

\*EXAMINER: Initial if reference considered, whether or not citation is in conformance with MPEP 609. Draw line through citation if not in conformance and not considered. Include copy of this form with next communication to applicant.

1 Applicant's unique citation designation number (optional). 2 Applicant is to place a check mark here if English language Translation is attached. This collection of information is required by 37 CFR 1.97 and 1.98. The information is required to obtain or retain a benefit by the public which is to file (and by the USPTO to process) an application. Confidentiality is governed by 35 U.S.C. 122 and 37 CFR 1.14. This collection is estimated to take 2 hours to complete, including gathering, preparing, and submitting the completed application form to the USPTO. Time will vary depending upon the individual case. Any comments on the amount of time you require to complete this form and/or suggestions for reducing this burden, should be sent to the Chief Information Officer, U.S. Patent and Trademark Office, U.S. Department of Commerce, P.O. Box 1450, Alexandria, VA 22313-1450. DO NOT SEND FEES OR COMPLETED FORMS TO THIS ADDRESS. SEND TO: Commissioner for Patents, P.O. Box 1450, Alexandria, VA 22313-1450.

If you need assistance in completing the form, call 1-800-PTO-9199 and select option 2.

<b>Substitute for Form 1449</b>  <b>Information Disclosure Statement By Applicant</b>	Application Number	10/609,033
	Filing Date	06/27/2003
	First Named Inventor	Mark Albrecht
	Art Unit	3621
	Examiner Name	
Sheet 2 of 6	Attorney Docket No.	XTAX-P001US2

## U.S. PATENT DOCUMENTS

Examiner Initials*	Cite No. <sup>1</sup>	Document Number	Publication Date MM-DD-YYYY	Name of Patentee or Applicant of Cited Document	Pages, Columns, Lines, Where Relevant Passages or Relevant Figures Appear
		US-2003/0154115	08/14/2003	Lahey et al.	
		US-2003/0154113	08/14/2003	Chen et al.	
		US-2003/0669777	04/10/2003	Or-Bach	
		US-2001/0051913	12/13/2001	Vashistha et al.	
		US-2003/0182212	09/25/2003	Moscone et al.	
		US-2003/0097319	05/22/2003	Moldoven et al.	
		US-2003/0046134	03/06/2003	Frolick et al.	
		US-2002/0099561	07/25/2002	Wilkins et al.	
		US-2002/0082996	06/27/2002	Scott et al.	
		US-5,799,286	08/25/1998	Morgan et al.	
		US-2003/0009365	01/09/2003	Tynan et al.	
		US-2002/0038228	03/28/2002	Waldorf	
		US-2002/0022982	02/21/2002	Cooperstone et al.	
		US-5,666,490	09/09/1997	Gillings et al.	
		US-2003/0041033	02/27/2003	Kaplan	
		US-2002/0123898	09/05/2002	Lemay et al.	
		US-6,343,275	01/29/2003	Wong	
		US-6,115,690	09/05/2000	Wong	
		US-2003/0033184	02/13/2003	Benbassat et al.	
		US-2002/0010665	01/24/2002	Lefebvre et al.	

## FOREIGN PATENT DOCUMENTS

Examiner Initials*	Cite No. <sup>1</sup>	Foreign Patent Document Country Code <sup>3</sup> Number <sup>4</sup> Kind Code <sup>5</sup> (if known)	Publication Date MM-DD-YYYY	Name of Patentee or Applicant of Cited Document	Pages, Columns, Lines, Where Relevant Passages or Relevant Figures Appear	T <sup>6</sup>

Examiner Signature		Date considered	
--------------------	--	-----------------	--

\*EXAMINER: Initial if reference considered, whether or not citation is in conformance with MPEP 609. Draw line through citation if not in conformance and not considered. Include copy of this form with next communication to applicant.

1 Applicant's unique citation designation number (optional). 2 Applicant is to place a check mark here if English language Translation is attached. This collection of information is required by 37 CFR 1.97 and 1.98. The information is required to obtain or retain a benefit by the public which is to file (and by the USPTO to process) an application. Confidentiality is governed by 35 U.S.C. 122 and 37 CFR 1.14. This collection is estimated to take 2 hours to complete, including gathering, preparing, and submitting the completed application form to the USPTO. Time will vary depending upon the individual case. Any comments on the amount of time you require to complete this form and/or suggestions for reducing this burden, should be sent to the Chief Information Officer, U.S. Patent and Trademark Office, U.S. Department of Commerce, P.O. Box 1450, Alexandria, VA 22313-1450. DO NOT SEND FEES OR COMPLETED FORMS TO THIS ADDRESS. SEND TO: Commissioner for Patents, P.O. Box 1450, Alexandria, VA 22313-1450.

Under the Paperwork Reduction Act of 1995, no persons are required to respond to a collection of information unless it contains a valid OMB control number.

<b>Substitute for Form 1449</b>  <b>Information Disclosure Statement By Applicant</b>		Application Number		10/609,033		
		Filing Date		06/27/2003		
		First Named Inventor		Mark Albrecht		
		Art Unit		3621		
		Examiner Name				
Sheet 3 of 6		Attorney Docket No.		XTAX-P001US2		
<b>U.S. PATENT DOCUMENTS</b>						
Examiner Initials*	Cite No. <sup>1</sup>	Document Number	Publication Date MM-DD-YYYY	Name of Patentee or Applicant of Cited Document	Pages, Columns, Lines, Where Relevant Passages or Relevant Figures Appear	
		US-2002/0091574	07/11/2002	Lefebvre et al.		
		US-2003/0069831	04/10/2003	Le et al.		
		US-6,314,425	11/06/2001	Serbinis et al.		
		US-6,314,415	11/06/2001	Mukherjee		
		US-5,850,219	12/15/1998	Kumomura		
		US-2002/0116308	18/22/2002	Cunningham		
		US-2002/0002469	01/03/2002	Hillstrom		
		US-2002/0019741	02/14/2002	Heston		
		US-2002/0026328	02/28/2002	Westerkamp et al.		
		US-2003/0004767	01/02/2003	Ohsaki		
		US-6,442,528	08/27/2002	Notani et al.		
		US-2002/0161615	10/31/2002	Yui et al.		
		US-6,151,583	11/21/2000	Ohmura et al.		
		US-6,006,193	12/21/1999	Gibson et al.		
		US-5,974,392	10/26/1999	Endo		
		US-5,937,388	08/10/1999	Davis et al.		
		US-5,873,067	02/16/1999	Kobayashi		
		US-2003/0093458	05/15/2003	Poindexter et al.		
		US-5,745,687	04/28/1998	Randell		
		US-2003/0171961	09/11/2003	Hosali et al.		
<b>FOREIGN PATENT DOCUMENTS</b>						
Examiner Initials*	Cite No. <sup>1</sup>	Foreign Patent Document Country Code <sup>3</sup> Number <sup>4</sup> Kind Code <sup>5</sup> (if known)	Publication Date MM-DD-YYYY	Name of Patentee or Applicant of Cited Document	Pages, Columns, Lines, Where Relevant Passages or Relevant Figures Appear	T <sup>6</sup>

Examiner Signature		Date considered	
--------------------	--	-----------------	--

\*EXAMINER: Initial if reference considered, whether or not citation is in conformance with MPEP 609. Draw line through citation if not in conformance and not considered. Include copy of this form with next communication to applicant.

1 Applicant's unique citation designation number (optional). 2 Applicant is to place a check mark here if English language Translation is attached. This collection of information is required by 37 CFR 1.97 and 1.98. The information is required to obtain or retain a benefit by the public which is to file (and by the USPTO to process) an application. Confidentiality is governed by 35 U.S.C. 122 and 37 CFR 1.14. This collection is estimated to take 2 hours to complete, including gathering, preparing, and submitting the completed application form to the USPTO. Time will vary depending upon the individual case. Any comments on the amount of time you require to complete this form and/or suggestions for reducing this burden, should be sent to the Chief Information Officer, U.S. Patent and Trademark Office, U.S. Department of Commerce, P.O. Box 1450, Alexandria, VA 22313-1450. DO NOT SEND FEES OR COMPLETED FORMS TO THIS ADDRESS. SEND TO: Commissioner for Patents, P.O. Box 1450, Alexandria, VA 22313-1450.

Under the Paperwork Reduction Act of 1995, no persons are required to respond to a collection of information unless it contains a valid OMB control number.

<b>Substitute for Form 1449</b>  <b>Information Disclosure Statement By Applicant</b>		Application Number		10/609,033		
		Filing Date		06/27/2003		
		First Named Inventor		Mark Albrecht		
		Art Unit		3621		
		Examiner Name				
Sheet 4 of 6		Attorney Docket No.		XTAX-P001US2		
<b>U.S. PATENT DOCUMENTS</b>						
Examiner Initials*	Cite No. <sup>1</sup>	Document Number	Publication Date MM-DD-YYYY	Name of Patentee or Applicant of Cited Document	Pages, Columns, Lines, Where Relevant Passages or Relevant Figures Appear	
		US-2003/0126003	07/03/2003	vom Scheidt et al.		
		US-2003/0083910	05/01/2003	Sayal et al.		
		US-6,539,404	03/25/2003	Ouchi		
		US-2003/0036934	02/20/2003	Ouchi		
		US-2003/0004770	01/02/2003	Miller et al.		
		US-2002/0138322	09/26/2002	Umezawa et al.		
		US-6,401,073	06/04/2002	Tokuda et al.		
		US-2002/0065701	05/30/2002	Kim et al.		
		US-2002/0040312	04/04/2002	Dhar et al.		
		US-6,144,955	11/07/2000	Tsuiki et al.		
		US-6,088,679	07/11/2000	Barkley		
		US-6,073,109	06/06/2000	Flores et al.		
		US-5,535,322	07/09/1996	Hecht		
		US-2003/0050800	03/13/2003	Brandt et al.		
		US-2002/0087336	07/04/2002	Hale et al.		
		US-				
		US-				
		US-				
		US-				
		US-				
<b>FOREIGN PATENT DOCUMENTS</b>						
Examiner Initials*	Cite No. <sup>1</sup>	Foreign Patent Document Country Code <sup>3</sup> Number <sup>4</sup> Kind Code <sup>5</sup> (if known)	Publication Date MM-DD-YYYY	Name of Patentee or Applicant of Cited Document	Pages, Columns, Lines, Where Relevant Passages or Relevant Figures Appear	T <sup>6</sup>

Examiner Signature	Date considered
--------------------	-----------------

\*EXAMINER: Initial if reference considered, whether or not citation is in conformance with MPEP 609. Draw line through citation if not in conformance and not considered. Include copy of this form with next communication to applicant.

1 Applicant's unique citation designation number (optional). 2 Applicant is to place a check mark here if English language Translation is attached. This collection of information is required by 37 CFR 1.97 and 1.98. The information is required to obtain or retain a benefit by the public which is to file (and by the USPTO to process) an application. Confidentiality is governed by 35 U.S.C. 122 and 37 CFR 1.14. This collection is estimated to take 2 hours to complete, including gathering, preparing, and submitting the completed application form to the USPTO. Time will vary depending upon the individual case. Any comments on the amount of time you require to complete this form and/or suggestions for reducing this burden, should be sent to the Chief Information Officer, U.S. Patent and Trademark Office, U.S. Department of Commerce, P.O. Box 1450, Alexandria, VA 22313-1450. DO NOT SEND FEES OR COMPLETED FORMS TO THIS ADDRESS. SEND TO: Commissioner for Patents, P.O. Box 1450, Alexandria, VA 22313-1450.

[illegible]

Examiner Signature		Date considered	
-----------------------	--	--------------------	--

1 Applicant's unique citation designation number (optional). 2 Applicant is to place a check mark here if English language Translation is attached. This collection of information is required by 37 CFR 1.97 and 1.98. The information is required to obtain or retain a benefit by the public which is to file (and by the USPTO to process) an application. Confidentiality is governed by 35 U.S.C. 122 and 37 CFR 1.14. This collection is estimated to take 2 hours to complete, including gathering, preparing, and submitting the completed application form to the USPTO. Time will vary depending upon the individual case. Any comments on the amount of time you require to complete this form and/or suggestions for reducing this burden, should be sent to the Chief Information Officer, U.S. Patent and Trademark Office, U.S. Department of Commerce, P.O. Box 1450, Alexandria, VA 22313-1450. **DO NOT SEND FEES OR COMPLETED FORMS TO THIS ADDRESS. SEND TO: Commissioner for Patents, P.O. Box 1450, Alexandria, VA 22313-1450.**

If you need assistance in completing the form, call 1-800-PTO-9199 and select option 2.

Under the Paperwork Reduction Act of 1995, no persons are required to respond to a collection of information unless it contains a valid OMB control number.

<b>Substitute for Form 1449</b>  <b>Information Disclosure Statement By Applicant</b>	Application Number	10/609,033
	Filing Date	06/27/2003
	First Named Inventor	Mark Albrecht
	Art Unit	3621
	Examiner Name	
Sheet <u>6</u> of <u>6</u>	Attorney Docket No.	XTAX-P001US2

NON PATENT LITERATURE DOCUMENTS			
Examiner Initials*	Cite No.1	Include name of the author (in CAPITAL LETTERS), title of the article (when appropriate), title of the item (book, magazine, journal, serial, symposium, catalog, etc.), date, page(s), volume-issue number(s), publisher, city and/or country where published.	T <sub>2</sub>
		Bookkeeper and Controllorship Hassle Free Services, Balance Your Books LLC; Retrieved from the Internet at <a href="http://www.balanceyourbooks.com/services.shtml">http://www.balanceyourbooks.com/services.shtml</a> .	
		Outsourcing Solution, April 2003, CPA Wealth Provider.	
		Citrix Independent Computing Architecture, November 23,2002, Citrix Systems, Inc; Retrieved from the Internet at <a href="http://www.citrix.com/press/corpinfo/ica.asp">http://www.citrix.com/press/corpinfo/ica.asp</a>	
		L. Gary Boomer, The Bombay Connection, September 27, 2002, Boomer Consulting, Inc; Retrieved from the Internet at <a href="http://www.boomer.com/bulletin/article.asp?ArticleId=965-2--2-08-27-39213-83">http://www.boomer.com/bulletin/article.asp?ArticleId=965-2--2-08-27-39213-83</a> .	
		L. Gary Boomer, Document management--paper-less is more!, Accounting Today, August 2002, Boomer's Blueprint.	
		Your Tax Preparation Partner, September 19, 2002, SurePrep; Retrieved from the Internet at <a href="http://sureprep.com/index.html">http://sureprep.com/index.html</a> .	
		The Industry's Premier Tax Compliance System, CCH; Retrieved from the Internet at <a href="http://tax.cchgroup.com/Pfx/Products/Tax/default">http://tax.cchgroup.com/Pfx/Products/Tax/default</a> .	

Examiner Signature		Date considered	
--------------------	--	-----------------	--

\*EXAMINER: Initial if reference considered, whether or not citation is in conformance with MPEP 609. Draw line through citation if not in conformance and not considered. Include copy of this form with next communication to applicant.

1 Applicant's unique citation designation number (optional). 2 Applicant is to place a check mark here if English language Translation is attached.

This collection of information is required by 37 CFR 1.97 and 1.98. The information is required to obtain or retain a benefit by the public which is to file (and by the USPTO to process) an application. Confidentiality is governed by 35 U.S.C. 122 and 37 CFR 1.14. This collection is estimated to take 2 hours to complete, including gathering, preparing, and submitting the completed application form to the USPTO. Time will vary depending upon the individual case. Any comments on the amount of time you require to complete this form and/or suggestions for reducing this burden, should be sent to the Chief Information Officer, U.S. Patent and Trademark Office, U.S. Department of Commerce, P.O. Box 1450, Alexandria, VA 22313-1450. DO NOT SEND FEES OR COMPLETED FORMS TO THIS ADDRESS. SEND TO: Commissioner for Patents, P.O. Box 1450, Alexandria, VA 22313-1450.